Account Startup Guide

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Account Startup Requests

You can request a Pre-Paid account and Custom Store including Custom Stores for Terms Accounts by using the Account Startup process.

Create a new Task on the CRM account and assign to your Market Account Startup Team.

Task Types (see appendix) indicate the request type and help indicate the status of each request in the CRM.

The Account Startup Templates must be included in the comments section of the created task. Failing to follow this process will delay your Customer's invitation.

Custom Store Request Account Types

Prepaid Accounts - New Account Creation and Custom Store Invitations
For eligible Customers who spent $5K+ in the last 12 months and do not yet have a Pre-Paid Account or for existing Pre-Paid Customers who have spent $5K+ in the last 12 months with Retail Business Team but do not yet have a Custom Store.

Terms Accounts - Custom Store Requests
Follow this process for existing Terms Customers who have spent $5K+ in the last 12 months with Retail Business Team but do not yet have a Custom Store. Follow the steps detailed in Financial Services guide to initiate a Terms Account request if the customer is eligible but do not yet have a Terms Account.

Request Template

There are two Custom Store request templates: New Account Startup and Account Update Template.

1. The **New Account Template** is used when requesting an initial Custom Store or Pre-Paid request.
2. The **Account Update Template** is used to request additional users, role changes or other changes to an existing account.

New Account Startup Template

SAP Sold To:

Store Number:

Pre-Paid Account Legal Name:

Pre-Paid Account DBA Name:

Company Website:

Billing Verification: (Y/N) To Expedite request attach Customer Billing Verification to Company Record Billing Address:

Email Address Verification Attached: (Y/N)

Shipping Address:

Tax Exempt: (Y/N) If Tax exempt, Accounts Payable

Contact email:

Custom Store Role:

Custom Store User First Name:

Custom Store User Last Name:

Custom Store User Email: (Business Domains Only)

Account Update Template

Request Type:

SAP Sold To:

Company Name:

Custom Store Role:

Custom Store User First Name:

Custom Store User Last Name:

Custom Store User Email: (Business Domains Only)

Account Startup Overview

Unified Prepaid Custom Store Request

Use for Customers who require both a SAP Prepaid Sold To and a Custom Store invitation follow the steps below.

Retail Business Teams — **Identify need for a Custom Store**

- Demonstrate the Custom Store experience and value
- Team email Customer to inform that a Custom Store is coming
  - See appendix for an Example
- Team Validates Customer info and ensures all info in CRM is accurate

Retail Business Teams — **Unified Prepaid CS Request**

- Create a new task associated with a Company
- Insert and complete the New Account Startup Template
- Attach Tax Documents and Proof of Business Address if required
- Task Type = Unified Prepaid CS Request
- Task status = Not started

Engagement Team — **Pre-Paid SAP Sold To is underway**

- Task type changes to Hold for SAP Population
- Task status = In Progress
- 2 business day SLA

Engagement Team — **Customer invitation**

- Task type changes to CS Invitation request
- Task status = In Progress
- MyAccess invitation sent to Customer
- 1 Business day SLA

Engagement Team — **Customer Accepts invitation**

- Task type changes to CS User Accepted
- Task status = Completed
- Customer completes MyAccess invitation request
- SLA varies pending Customer Action

Retail Business Team — **Post Registration Follow-up**

- Use Saved Search to identify recently accepted invitation (see P. 21)
- Team creates a new Task set to 24 hours post registration
- Schedule a call to discuss adding new users
- Offer to help Custom place their first order

Custom Store Invitation Request (existing SAP Sold To)

Use for Customers who have an existing SAP Sold To and require a Custom Store invitation.

Use this process for any new Custom Store user invitation request. A user must be added as a Contact to the Company record in the CRM before an invitation can be initiated.

Retail Business Team — Identify need for a Custom Store

- Demonstrate the Custom Store experience and value
- Team email Customer to inform that a Custom Store is coming
- Team Validates Customer info and ensures all info in CRM is accurate

Retail Business Team — Custom Store Invitation Request

- Create a new task associated with a Company
- Insert and complete the Account Update Template.
- Attach Tax Documents and Proof of Business Address as needed
- Task Type = CS Invitation request
- Task status = Not Started

Engagement Team — Customer invitation

- Task Type = CS Invitation request
- Task status = In Progress
- MyAccess Invitation sent to Customer
- 1 business day SLA

Engagement Team — Customer Accepts invitation

- Task Type changes to CS User Accepted
- Task status = completed
- Customer completes MyAccess invitation request
- SLA varies pending Customer Action

Retail Business Team — Post Registration Follow-up

- Use Saved Search to identify recently accepted invitation
- Team creates a new Task set to 24 hours post registration
- Schedule a call to discuss adding new users
- Offer to help Custom place their first order

Escalating an Issue for Program or User support

Occasionally, Customers have requests regarding their stores or Accounts.

Reference the FAQs in this document before escalating issues.

If you are unable to answer your customer's question use the following template to escalate to your Account Startup Team by creating a Task in Apple CRM. Be sure to include all necessary details so that the team can respond as quickly as possible to resolve the issue or answer the question.

Please confirm the necessary details are present and will assist with resolution.

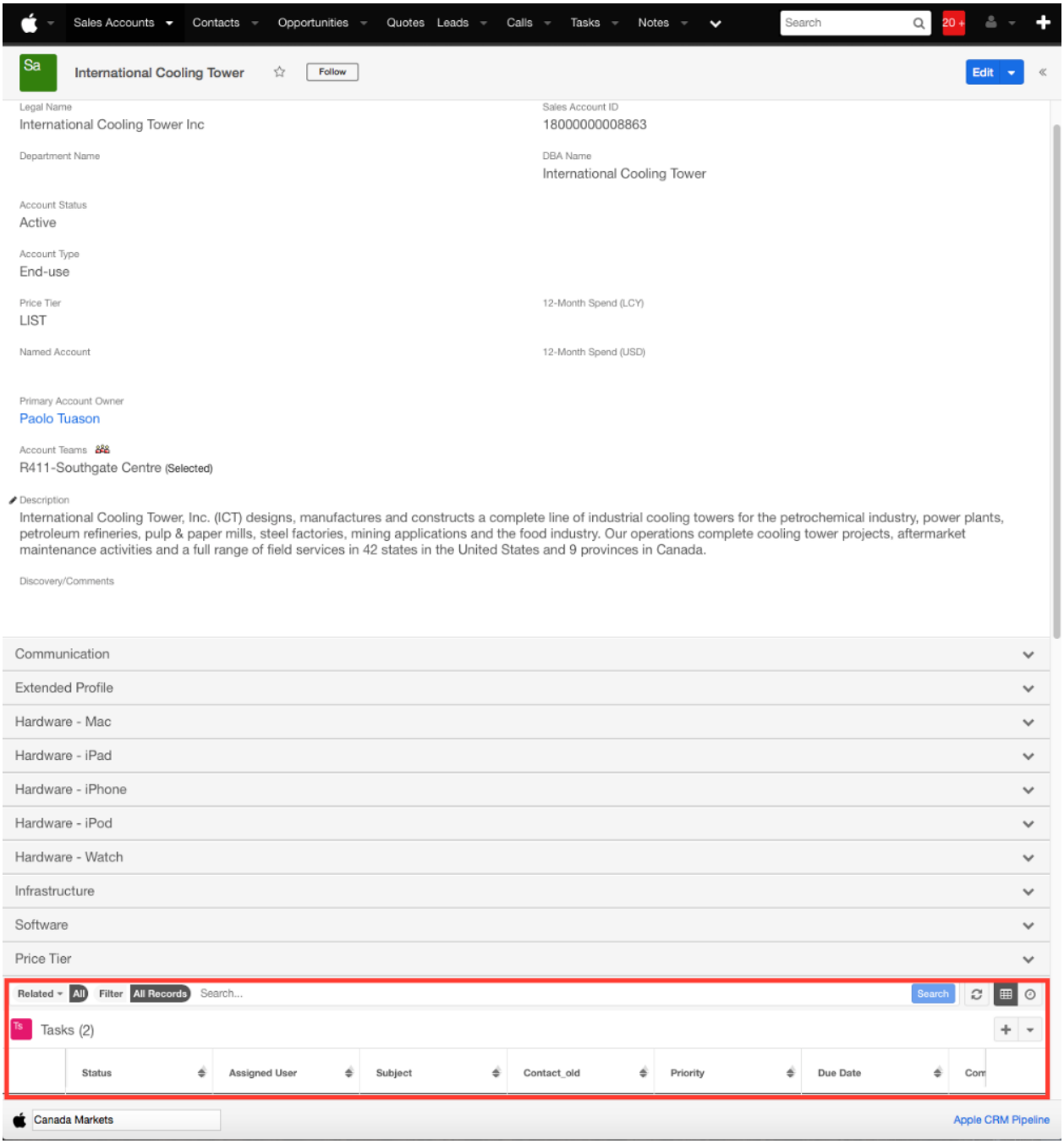
Custom Store Issue Escalation Template

- Company Name:
- Company CID:
- SAP Sold To:
- Customer Name:
- Customer Email:
- Custom Store Login ID:
- Specific Request:

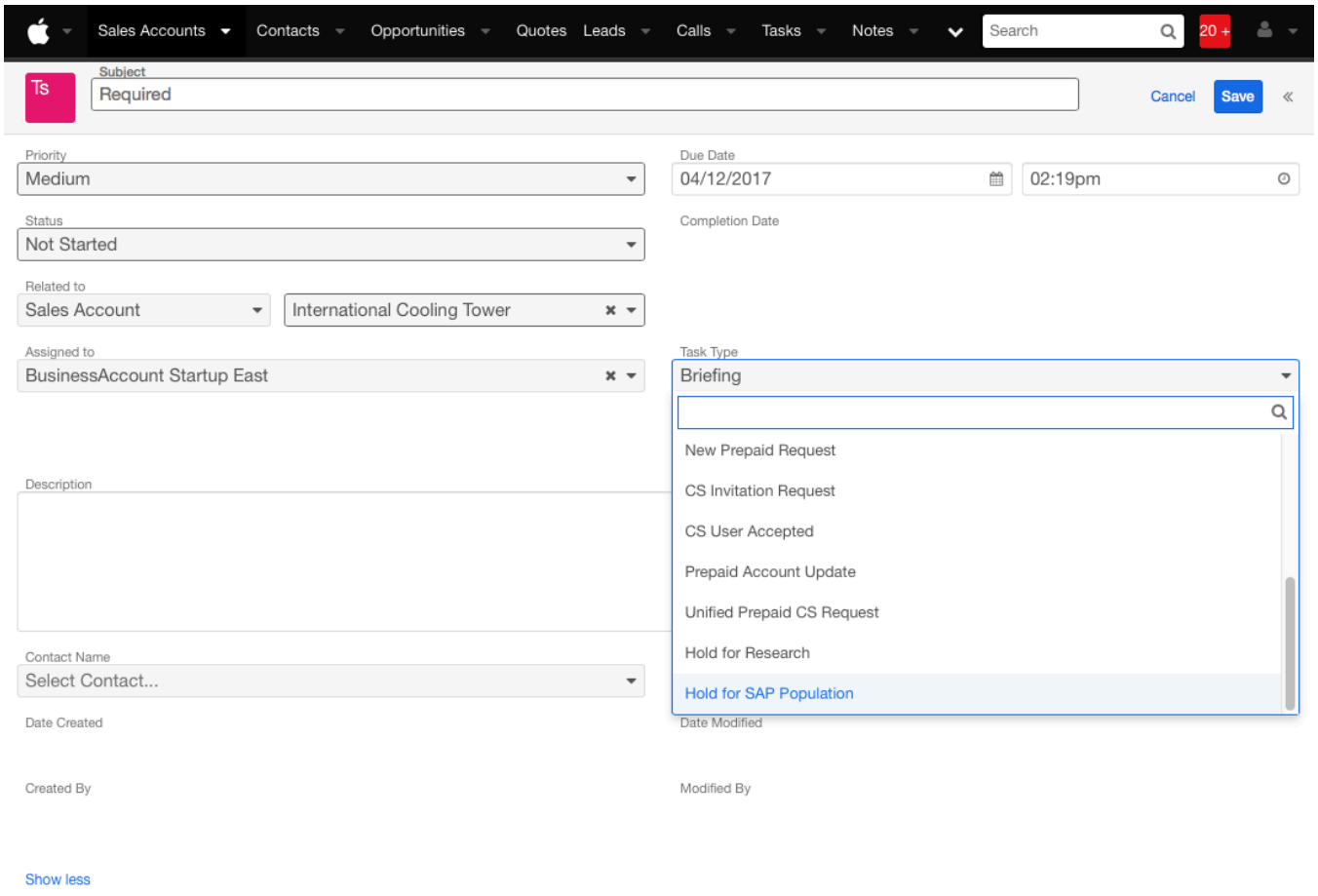
Appendix

Account StartUp Screenshots

Create a new Task from a Company Record (example).



Create a new Task from a Company Record and Task Types (example)



CRM Task Saved Searches

Use saved Task searches to track the status of the Customer as the progress from set-up to registration.

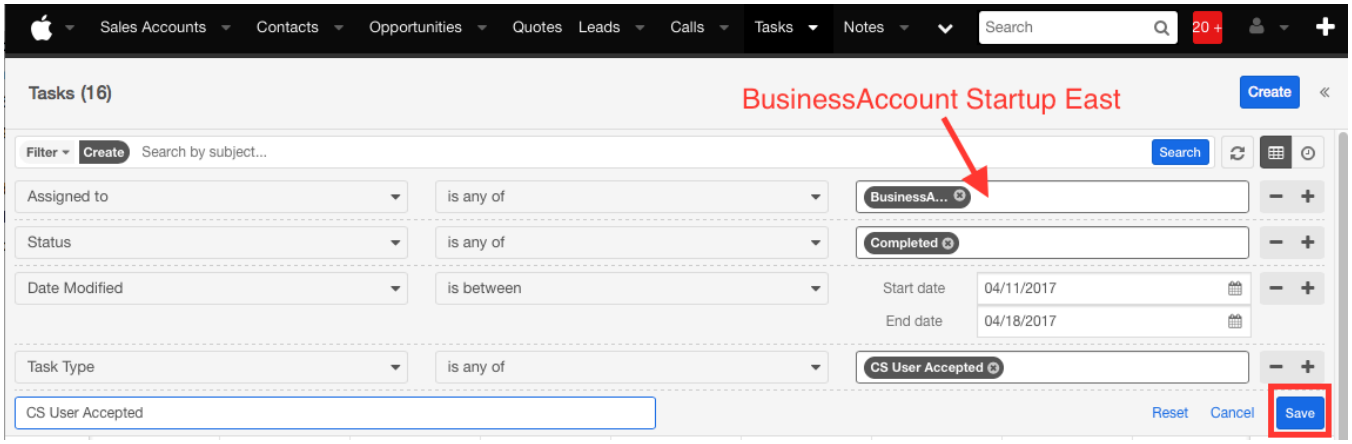
By creating a saved search you can easily identify which customers require a follow-up conversation and who to contact to discuss next steps in the journey, i.e. invite additional users, help with registration questions or assist with placing the first order.

A best practice is create saved searches that enable you to each day quickly identify Customers who have recently registered or who have not registered and create a task to follow-up with them to help them get the most out of their Custom Store experience.

Example Saved Search, CS User Accepted

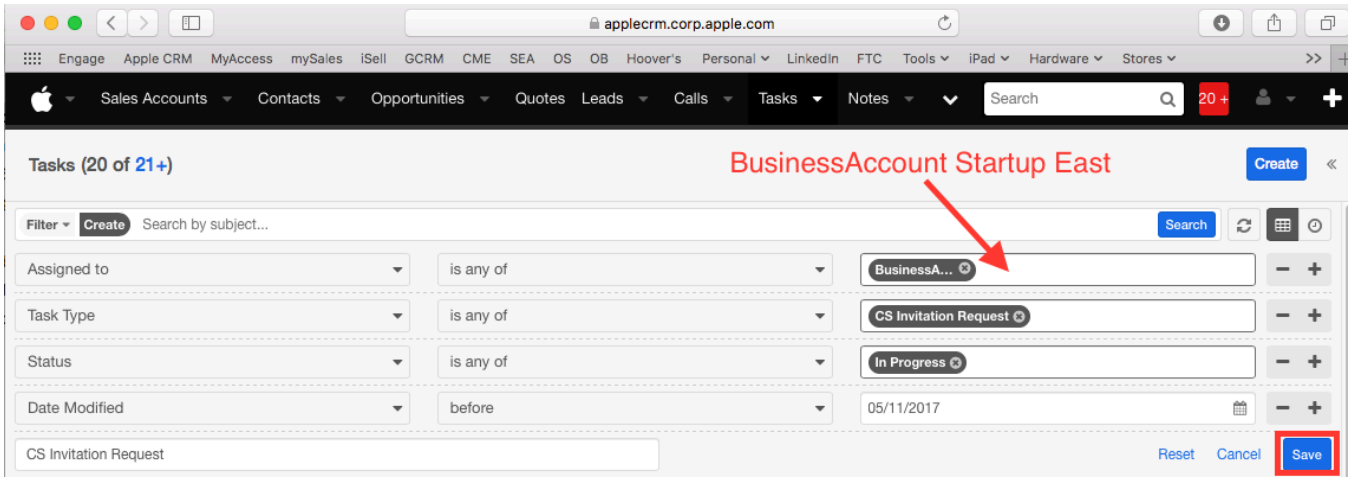
The example below shows the filters used to find Customers who have accepted the invitation and have registered for their Custom Store.

Using the results from this filter create a new task to follow-up with the Customer to discuss next steps in the journey, i.e. invite additional users, help with registration questions or assist with placing the first order.



Example Saved Search, CS Invitation Request

The example below shows the filter used to find Customers invited to register for a Custom Store but have not completed their registration.



Task Type and Status Definitions

Task Types and Status are used to indicate a Customers progress through the Custom Store Set-up process.

Task Type	Definition	Owner	Task Status
New Prepaid Request	This task type is used when the Business Team would like to request a Prepaid SAP Sold To ONLY.	Retail Business Team	Not Started
CS Invitation Request	This task type is used when the Business Team would like a Custom Store registration invitation be sent to a Company/Customer with an existing RB/IB SAP Sold To already linked to the CRM record.	Retail Business Team and Engagement Team	Retail Business Requests will reflect the Pending status. Engagement Team will move to the scheduled status once the invitation is sent to the Customer
Prepaid Account Update	This task type is used when the Business Team would like an updated made to an existing SAP. Examples include change of address, addition of tax exempt status, etc.	Retail Business Team	Not Started
Unified Prepaid CS Request	This task type is used when the Business Team would like a new Prepaid SAP created and, when complete, a custom store invitation sent to a user.	Retail Business Team	In Progress
Hold for Research	This task type will be an indication to the Business Team that additional information is being reviewed to determine the company's alignment to the end user license agreement. The Engagement Team will reach out to leadership when this status is required.	Engagement Team	In Progress
Hold for SAP Population	This task type will be an indication to the Business Team that the Prepaid SAP has been submitted, may be visible in the CRM, but is not yet available in the tool that allows Custom Store invitations to be sent. Once the SAP is available, the invitation will be sent.	Engagement Team	In Progress
CS User Accepted	This task type will be an indication to the Business Team that a Custom Store user has registered as a Purchaser/Admin Purchaser and has been accepted. Full access to the custom store is now available to the user.	Engagement Team	Complete